



REPLY TO  
ATTENTION OF  
SFIM-SW-HR

DEPARTMENT OF THE ARMY  
INSTALLATION MANAGEMENT AGENCY  
SOUTHWEST REGION  
1204 STANLEY ROAD, SUITE 9  
FORT SAM HOUSTON, TX 78234-5009


13 JAN 2004

MEMORANDUM FOR All Southwest Region Office (SWRO) Installation Management Agency (IMA) Personnel

SUBJECT: SWRO Policy Memorandum #8 – Individual Development Plan (IDP)

1. PURPOSE. To provide guidance to all SWRO personnel (internal policy).
2. APPLICABILITY. These procedures are applicable to all civilian personnel assigned to the SWRO IMA.
3. PROCEDURES.
  - a. Effective this rating cycle, all SWRO employees, in consultation with their supervisor, will develop an IDP outlining their career development goals and requirements. All IDPs must be completed and signed no later than 27 February 2004. Subsequently, IDPs will be updated on an annual basis in conjunction with the employee's annual support form.
  - b. The Human Resources Division has developed the enclosed IDP Instruction Guide and Form for your use in establishing employee IDPs. The guide outlines the definition and goals of an IDP, the responsibilities of the employee and supervisor in completing the IDP and provides a step-by-step process for preparing the IDP form.
  - c. The IDP has several purposes. First, it provides the employee the opportunity to develop an action plan to move from where they currently are to where they would like to go in their career. Second, it provides an opportunity for the supervisor to provide valuable feedback and coaching on what they believe the employee requires to progress. And third, it allow us to map out and fund a Southwest Region Office game plan to ensure our employees get the right training at the right time in their career.
4. PROPONENT. The Human Resources Division is the proponent for this Policy Memorandum. POC is Mr. Manuel Rodriguez, HR Specialist. He may be reached at 221-9462 or by email [Manuel.Rodriguez@samhouston.army.mil](mailto:Manuel.Rodriguez@samhouston.army.mil).

- 2 Enclosures  
1. IDP Guide  
2. IDP Form

  
KATHLEEN Y. CURD  
Chief of Staff

# **INSTALLATION MANAGEMENT AGENCY SOUTHWEST REGION**



## **GUIDE FOR INDIVIDUAL DEVELOPMENT PLAN**

## GUIDE FOR INDIVIDUAL DEVELOPMENT PLAN

1. **PURPOSE.** This Instruction provides guidance on how to effectively employ an Individual Development Plan (IDP). An IDP is a performance improvement tool designed for civilian employees of the Installation Management Agency's (IMA) Southwest Region. IDPs, properly used, assist our civilian employees in reaching their career goals. This Instruction outlines the definition and goals of an IDP, the responsibilities of the employee and supervisor in completing the Individual Development Plan (IDP) and provides a step-by-step process for preparing an IDP.

2. **INTRODUCTION.** The use of IDPs is widely recognized in government and industry as a tool for member/employee professional development and for budgeting available unit training dollars. Using an IDP benefits both the employee and IMA. The employee learns about his or her personal and career needs and aspirations by identifying their short- and long-term goals. By doing so, the employee identifies what they want to achieve and what steps they need to take to reach those goals. An IDP facilitates a partnership between the employee and supervisor by encouraging two way feedback and prompting clarification and discussion about the employee's development needs, setting goals and plans and understanding how these goals and objectives tie into IMA's organizational goals and objectives.

**It is essential that the supervisor and employee work together on the IDP. Although the IDP is not a performance evaluation tool, the convenient time for the employee and supervisor to meet is at the beginning of the rating cycle or within 45 days upon entry in a new position/job or permanent change of station.**

3. **DEFINITION.** An IDP is a tool to help IMA civilian employees reach career goals within the context of organizational objectives. It is a developmental "action" plan to move employees from where they are to where they want to go. It provides the systematic steps to build on strengths and overcome weaknesses as employees improve job performance and pursue career goals. It is a tool for all employees regardless of rank or performance.

The most common objectives for having an IDP are to:

- Learn new skills and competencies to improve current job performance
- Maximize current performance in support of organizational requirements
- Increase interest, challenges, and satisfaction in current position
- Obtain competencies necessary for a promotion or change in grade, series, or field

4. **ROLES AND RESPONSIBILITIES.** Both the employee and supervisor have important roles in the IDP process. The IMA's success is directly attributed to the quality of its people. If our people are not encouraged to grow beyond their current knowledge, skills, and abilities, the IMA will not become an "agency of employment choice" and will not be able to keep pace in our rapidly transforming organization. The IMA's ability to develop its people into a diverse, multi-skilled workforce depends on each person contributing to the process.

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a. The employee is responsible for:

- Assessing their past experiences, knowledge, skills and abilities against the development objectives of IMA
- Drafting the initial plan by identifying short and long-range developmental needs and competencies and educational, training and professional development sources to satisfy these requirements
- Prepare a proposed 5-year timeline for accomplishing developmental activities
- Meeting with their supervisor at the beginning of their rating cycle to discuss and reach agreement on the objectives and specific plan for accomplishing the objectives
- Satisfactorily completing all assigned reading, education and developmental assignments.

b. The supervisor is responsible for:

- Educating the employees within their chain of command on the IDP process and to ensure its use
- Performing a developmental needs assessment, in cooperation with the employee, to assist the individual in planning and formulating actions to successfully accomplish identified career objectives.
- Analyzing the competencies of the employee
- Assessing IMAs short and long term needs, staffing needs, mission, changes in technology, and the employees potential to meet those needs
- Determining what resources are available for employee development
- Meeting with the employee to provide feedback about developmental strengths and needs, coaching about possible developmental activities, and endorsing a development plan that addresses concerns by specifying, in detail, the goals and competencies needed for the present job and/or future positions.
- Including projected training needs in the units training plan
- Evaluating the development, activities and training completed by each employee

5. THE IDP FORM. The following guidance will assist you in filling out the IDP form (enclosure 1).

- Section 1 - General Information. Provide name, Social Security Number, position title, pay plan, series, grade/step, e-mail address and work phone
- Section 2 – Education. List any undergraduate or graduate degrees earned by the major area of academic concentration and the date completed
- Section 3 – Career Goals. State your short-term goals (achievable within 1-2 years) and long-term goals (achievable within 3-5 years). Goals can be written in any format you choose. You can specify a rate, rank, position, series, and grade, if desired, or simply indicate the new

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qualification, skill title, role you wish to achieve. The more specific the plan, the better you can identify developmental activities that can help you reach your goal.

- **Section 4 – Prior Training.** Identify all previous significant training, the source of the training, and the date completed. Significant training is defined as courses over one week (40+ hours) in length. Basic technical training courses and courses such as: EEO, HIV Awareness, Safety, Opsec, etc. need not be listed. Especially important are any leadership and management courses completed to include: Intern Leadership Development Course; Action Officer Development Course; Supervisor Development Course; OPM Course for New Supervisors; Managerial Development Course; Leadership, Education & Development; Organizational Leadership for Executives; Sustaining Base Leadership and Management; OSD's Executive Leadership & Development Program; Personnel Management for Executives I & II; Senior Service College; or Federal Executive Institute courses.
- **Section 5 – Development Goals.** Identify those goals or competencies that are critical to achieving your short- and long-term career goals. Identify a developmental activity for each targeted competency. Explore developmental activities in the areas of education (e.g. a college course in effective writing, speech, etc.), training (e.g., on-the-job training such as assisting in special work groups or projects) and professional development (e.g. reading, joining Toastmasters, joining a professional organization). Articulate the outcomes you desire to achieve by completing the particular training identified.
- **Section 6 – Career Broadening/Job Rotational Assignments.** Identify possible career broadening assignments that will allow you to become multi-skilled and to acquire a diverse background. This can be within your current organization or with a higher-level agency such as a regional office, HQ IMA, or HQDA. Provide an acceptable start date and anticipated duration of the assignment. Finally, list the competency objectives you wish to attain in this new assignment.
- **Section 7 – 5-Year Development Plan.** Use some thought in completing this section. Your objective should be to lay out a schedule that will permit you to sequentially develop the competencies and skills needed as you progress from your current level up to supervisory, manager and executive levels. List by quarter what education, training, professional development or career broadening assignments you would like to engage in over the next five years. Not every quarter requires an activity. For example: you may want to take a college course in one or two successive quarters and then leave two quarters open. The following year you may want to attend a leadership or management course (e.g., LEAD, PME I & II, etc.) The third and fourth year may be reserved for a career broadening assignment. The key is to request the right training at the right time in your career that builds upon your previous experiences and training.

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- Section 8 – Signature. Both you and your supervisor need to sign and date your completed IDP.

6. SUMMARY. If the IDP is followed closely, you will see that there is no definite end — this is a lifelong learning experience. As you implement your plan, you move closer to your goals and identify new needs and possibly more defined goals. You are acquiring the experiences, knowledge, and competencies you will need to fulfill your full potential and increase your effectiveness and performance within the Installation Management Agency and the United States Army.

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## Section 5: Development Goals

<i>Goal or Targeted Competency:</i>	<i>Development Activity – Education Training or Professional Development Sources:</i>	<i>Outcome Desired:</i>

## Section 6: Career Broadening/Job Rotational Assignments

<i>Assignment:</i>	
<i>Projected Start Date:</i>	
<i>Duration:</i>	
<i>Competency Objectives:</i>	

## Section 7: 5-Year Development Plan

List Course Title/Training by Fiscal Year (FY)

<b>FY 04</b>	
<b>FY 05</b>	
<b>FY 06</b>	
<b>FY 07</b>	
<b>FY 08</b>	

## Section 8: Signature

<i>Employee Signature:</i>		<i>Date:</i>	
<i>Supervisor's Printed Name:</i>		<i>Duty Phone:</i>	
<i>Title:</i>		<i>E-Mail:</i>	
<i>Supervisor Signature:</i>		<i>Date:</i>	